ActiveBuilding

User Manual

New to ActiveBuilding or need a refresher? This manual contains eight sections that will teach you all that you need to know to effectively use your portal.

We will cover:

For additional help please contact **support@activebuilding.com**.

REALPAGE®
Outperform

Signing in as a New User

Your portal is live and you've received your invitation email!
Now what?

1. Select *'Click Here to Get Started'*.

Click Here to Get Started!

2. If you are a new user, select *'I am a New User'*. Fill out steps 1-3.

I am a New User
and I want to create a new
account for this property

Step 1 of 3   Next Step: Notification Settings

3. If you already have an existing staff account for another property with the same email, select *'I have an Existing Account'*. To receive access, enter email and password.

**I have an Existing Account
at another ActiveBuilding Portal**
and I would like to access this
portal with the same account

YOU MAY USE YOUR EXISTING ACCOUNT
TO REGISTER WITH THIS PROPERTY AS
WELL

Email
_____

Password
_____

Go   Forgot your password?

4. Bookmark the URL for future logins at <propertyname>.activebuilding.com and enter your email and password.

ActiveBuilding
https://summercreek.activebuilding.com
Apps Master Admin salesforce.com - Unl...
Summer Creek   (214) 565-88

f Sign in with Facebook
OR
Email Address
Password   Forgot
☑ Remember my email
Log In

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Adding/Removing Staff Users

You can't do it all by yourself!

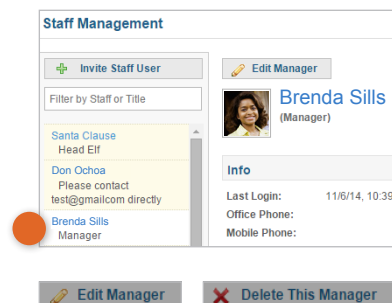**1.** To invite staff, go to **My Dashboard** > **Staff Management** > **Invite Staff User.**
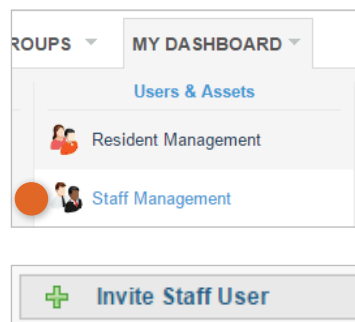
2. Enter name, title, messaging groups (optional), user access, email and invite by email.

3. To remove or edit staff, select a staff user. Next, select **'Edit Manager'** or **'Delete This Manager'.**

4. One email per account is allowed. However, staff can have an account at multiple properties using the same email. When registering for another property they will need to select, **'I have an Existing Account at another ActiveBuilding Portal'** and enter their email and password.
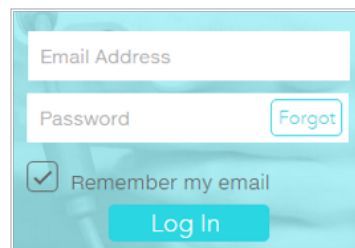
ActiveBuilding

Logging In

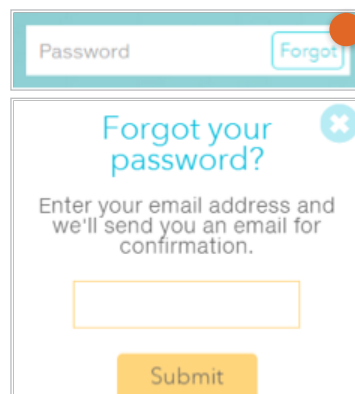You can access ActiveBuilding on your desktop or mobile device!

1. Bookmark the URL for future logins at **<propertyname>.activebuilding.com** and enter your email and password. Alternatively, if your property purchased the LeaseStar product through RealPage, ActiveBuilding will automatically redirect from your marketing website.

2. If you forget your password, select the **'Forgot'** button, located in the right side of the password box. Enter your email, submit and check your inbox to confirm your account and set a new password.

3. Users can now sign in with Facebook to access their ActiveBuilding portal. The only requirement is that the user's Facebook email is the same as their ActiveBuilding email.

4. Acceptable browsers include:
- Internet Explorer 9, 10 or 11
- Chrome – latest version
- Firefox – latest version
- Safari on a Mac

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Enterprise Users

Stay in the loop with what is going on in your portfolio!

1. Enterprise accounts are typically for corporate level employees who want an overview of what is going on at multiple properties. Bookmark the URL for future logins at login.activebuilding.com or <propertyname>.activebuilding.com and enter your email and password.

2. This account includes access to community activity, registration rates and usage stats (up to three months).

3. Additionally, enterprise users are able to log in to any property as an admin user that they are allowed access to.

4. Enterprise users are able to send and receive messages; however they do not have an inbox or sent mail folder like staff users. They will not be able to use any ActiveBuilding apps with their enterprise username and password. They will be able to sign in on their mobile device.

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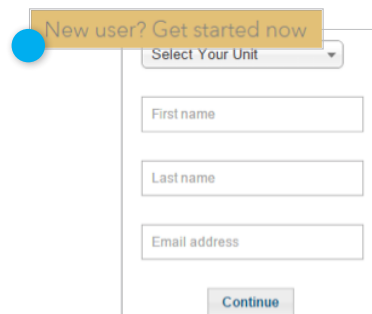
Staff Concierge

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Adding/Removing Residents

Make sure your residents receive important updates and notifications from the community!

OneSite Users–ActiveBuilding syncs with OneSite every morning to update move-ins, transfers and move-outs from the previous day. Current residents will receive an email invite during this sync.

1.

To send an email invite to a resident the day they are added in OneSite, go to the *'New user? Get started now'* workflow on right side of login page i.e., **<propertyname>.activebuilding. com.** Next, fill in unit, name and email exactly as it appears on leasing documents. If there is a match they will receive an email invite shortly.

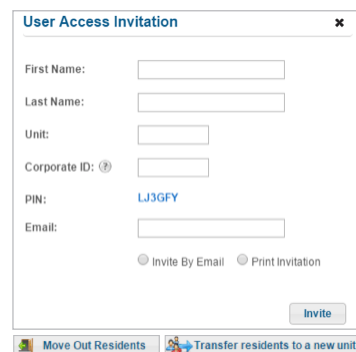*Other Users–You will want to include ActiveBuilding in your move in and out process.*

2.

To add a new resident, go to *My Dashboard* > *Resident Management* > *Resident Action* drop down menu > *Add a New Resident.* Or you can import multiple residents at once by selecting *'Import Residents'* from the drop down menu.
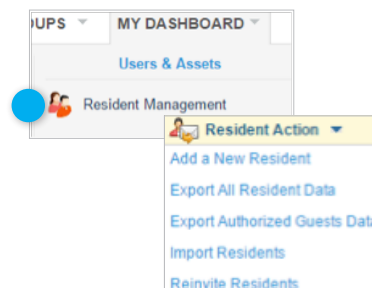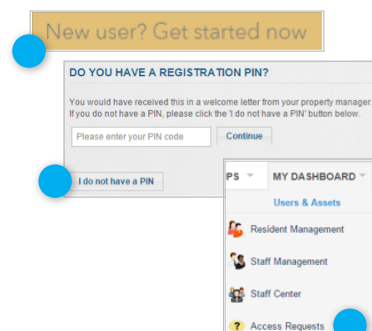
3.

To add a resident, fill in name, unit, email and select *invite by email* or *print invitation*. To move a resident out or transfer to a new unit, select resident or a unit. Next, select *'Move out Residents'* or *'Transfer residents to a new unit'* > select all applicable residents.

4.

Residents can also request access to join through the *'New user? Get started now'* workflow on the login page by selecting *'I do not have a PIN'*. If a resident requests access to join, access requests from residents will appear under *My Dashboard* > *Access Requests* to approve or deny.

*For more on how to register, see page 2, **Signing in as a New User***

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Unregistered Residents

Increase registration to ensure all residents are receiving the full benefit of ActiveBuilding!

1.

To check to see if a resident is unregistered, go to **My Dashboard** > **Resident Management**. Unregistered residents will have a question mark in a silhouette next to their name.
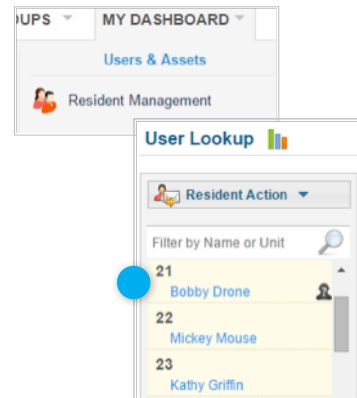

2.

To re-invite an unregistered resident go to **User Lookup**, search for unregistered resident and click into their name > select **Re-Send Invite** > **Invite or change email** > **Invite**.
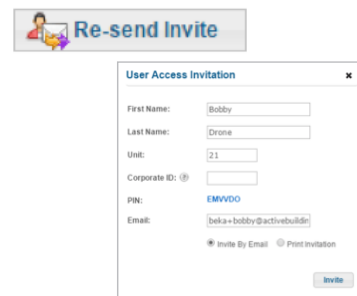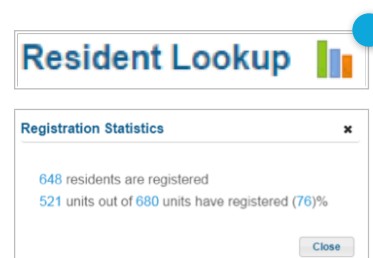

3.

To re-invite all unregistered residents, select the **Resident Action** drop down menu > **Re-invite residents** > **Re-invite**. From here you can also export all resident data by selecting, **'Export All Resident Data'.**
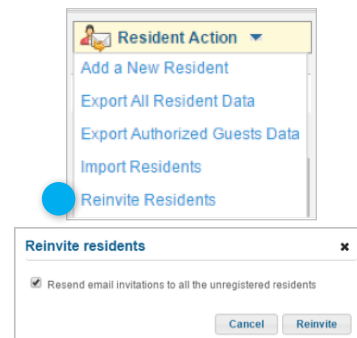
4.

To see how many residents have registered, go to **Resident Management** > select the colorful bar graph icon to the right of **Resident Lookup.**
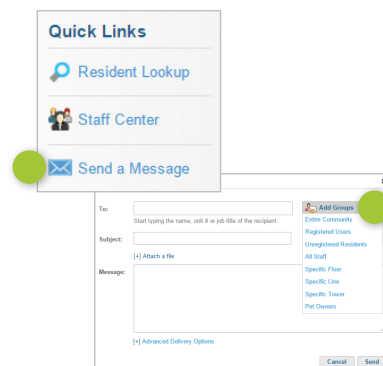
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In addition to email notifications there are text and voice notifications!

1. To send a message, select **'Send a Message'** in your **Quick Links**. You can select a group to send the message to under **'Add Groups'** or type the user's name, unit, or group in the **'To'** box. All messages are a blind copy, additionally there is no reply all feature.
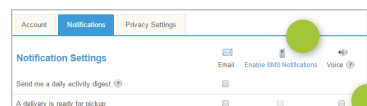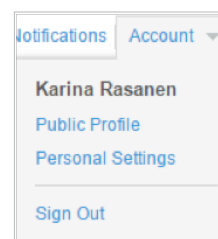
Quick Links
- Resident Lookup
- Staff Center
- Send a Message

To: Start typing the name, unit # or job title of the recipient

Subject:

[+] Attach a file

Message:

[+] Advanced Delivery Options

Cancel   Send

Add Groups
Entire Community
Registered Users
Unregistered Residents
All Staff
Specific Floor
Specific Line
Specific Tower
Pet Owners

2. Staff users can send text and voice notifications to residents by selecting the **'Advanced Delivery Options'** link below the message box.

[-] Advanced Delivery Options

Notification Options
- ☑ ✉ Send Email Notifications
- ☐ 🔊 Send Voice Notifications ⊘
- ☐ 📱 Send SMS Notifications ⊘
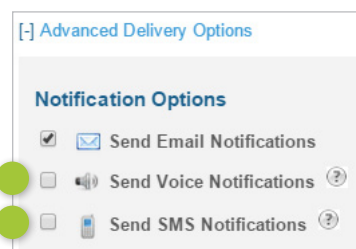
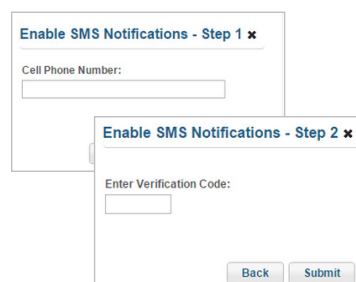**3.** All registered residents will receive email messages unless they opted out. You can help direct residents to change those settings by going to **Account** > **Notifications.**

Notifications | Account ▾

Karina Rasanen

Public Profile

Personal Settings

Sign Out

Account | Notifications | Privacy Settings

Notification Settings   Email   Enable SMS Notifications   Voice ⊘

Send me a daily activity digest ⊘   ☐

A delivery is ready for pickup   ☐   ☐   ☐

4. Before a resident can get texts they need to set text notifications by entering their mobile number. A 4-digit verification code will be sent to their mobile number that they will enter.

Enable SMS Notifications - Step 1 ✖

Cell Phone Number:

Enable SMS Notifications - Step 2 ✖

Enter Verification Code:

Back   Submit

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Getting Started Best Practices

Add content to give an overview of what is going on in your community!
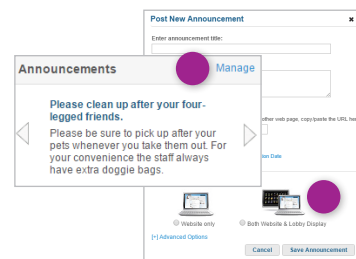
1. Add a starter post welcoming residents to the portal i.e., *"Welcome to our new community portal! What does everyone think?"*
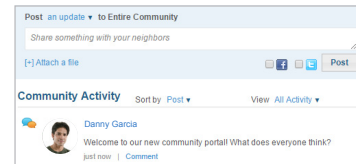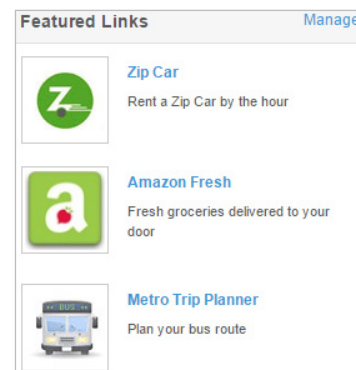

2. To give an overview of what is going on in the community you can create an announcement. To do this go to *Announcements* > *Manage* > *Post Public Announcement.*
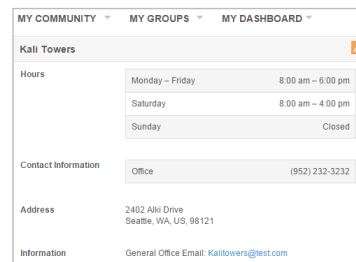

3. Featured links help your residents find more useful resources in your community. Set these to display on home page under *Featured Links* > *Manage* > *Add New Link* > check *featured link* box.

4. Inform your residents of all the ways they can reach you by adding general info. Go to *My Community* > *General Info* > select *pencil icon* by hovering over community title to add office hours and contact info.

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Community Activity Wall

An exclusive place for staff and residents to communicate with each other!

1. The community activity wall is a wall of updates from residents and staff; including events, marketplace items, recommendations and polls.
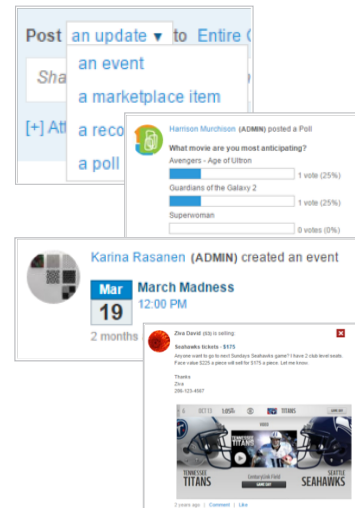
2. Staff can add documents and even organize in folders! You can add a document directly to the home page by attaching a file. Or you can store under *My Community* > *General Info* > *Add document* – when documents are added through this workflow it will automatically generate an activity post.
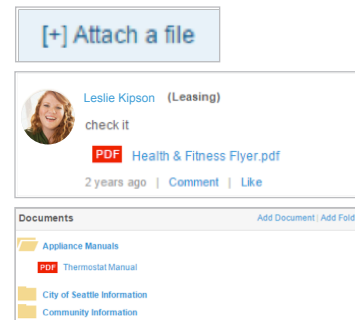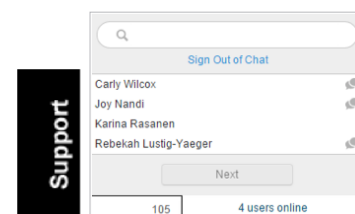
3. Groups are interest groups that you have joined. Instead of posting to the entire community, users can select a group that they have joined to post to.
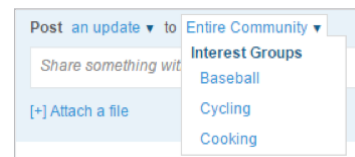
4. Additionally, you can chat online with other staff and residents by clicking into the grey chat box in the lower right hand corner of the screen and select someone's name. If you have an ActiveBuilding question, you can also select the *Support* tab on the left side of the screen.

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# Managing Community Activity

No double posting necessary!

1. You can have updates post to both ActiveBuilding and Facebook or Twitter by checking the social media box before posting. Setup these integrations by going to *My Dashboard* > *Application Settings* > *Social Media.*
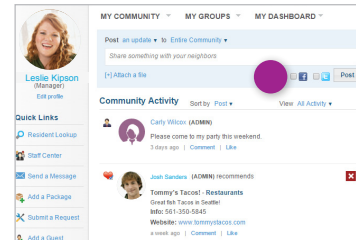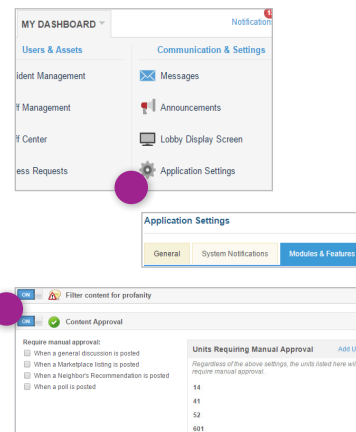
2. Daily digest emails summarize that day's happenings as another way to keep everyone informed. Registered users can opt out of receiving in *Account* > *Notifications Settings.*
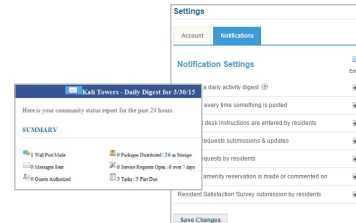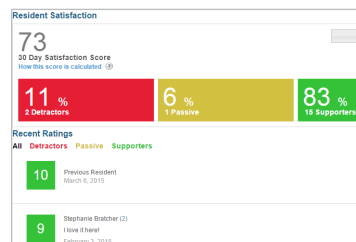
3. Decide if you want to see your residents message before posts or not. Go to *My Dashboard* > *Application Settings* > *Modules and Features* > *Filter Content for Profanity and/or Content Approval.*

4. Resident Satisfaction Surveys can be turned on to help gauge how your community feels. To turn on go to *My Dashboard* > *Application Settings* > *Modules and Features* > *Resident Satisfaction Surveys.*

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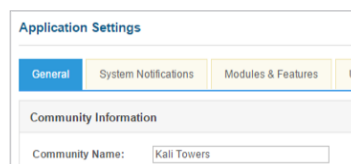
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Application Settings

Customize notifications and the look and feel of the portal!

*To edit your Application Settings, select **My Dashboard** > **Application Settings** from your ActiveBuilding home page.*
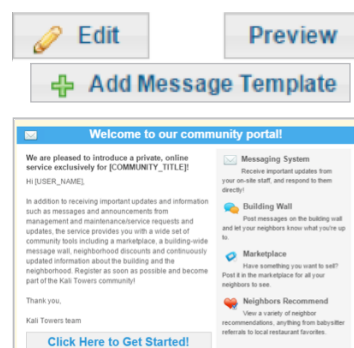
1. You can edit the way your property name appears at the top of your portal. To change the name of your property with the preferred wording, access the *'General'* tab > **Community Name** > **Save Changes.**
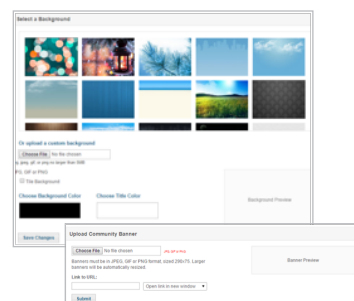

2. To edit/preview notifications or add a message template, you can do so by going to your **System Notifications**. If you'd like to customize the look of the notifications that come from ActiveBuilding you can provide us with hex codes colors for the main background, header background and header text. You can also provide a header image (JPG or PNG, ideally no larger than 240 pixels wide) and footer image (JPG or PNG, must be 580 pixels wide).
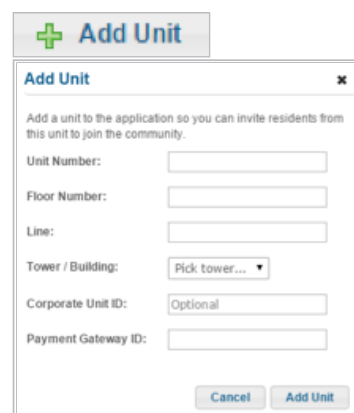

3. You can change the look and feel of your portal by going to **My Dashboard** > **Application Settings** > **Look & Feel**. Here you can select a new background or upload a Community Banner and Link to URL (optional) which will display on your home page.

4. To add a new unit in the Community Portal, access the **Unit Configuration** tab and select *'Add Unit'*. Fill out the pop-up form with the correct unit number, floor number, and building name/number, and click *'Add Unit'*. For OneSite and other users set up on a resident CSV integration, please make sure the Corporate Unit ID is also filled out.

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Account Settings

How to change your account, notification and privacy settings!

*To edit your settings, select **Account** > **Personal Settings** in the upper right of your ActiveBuilding home page.*
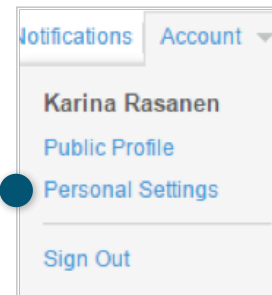
1. To change your name, email, and password or set an out of office notification, select *'Account Details'.*

Account Details

This information is accessible only to community management and will not be shared with anyone else

First Name:	Karina
Last Name:	Rasanen
Your Email:	karina+gsg@activebuilding.com
Office Phone:	(425) 753-1062
Mobile Phone:	
Password:	Change Password

Save Changes

2. Stay current with what is going on in the community by logging in daily and/or opting in to receiving all notifications. To edit notifications, including the ability to receive text notifications (or voice notifications for residents) select *'Notification Settings'.*

Notification Settings

Notification Method	Email	SMS +14257531062 Remove	Voice
Send me a daily activity digest	☐		
Notify me every time something is posted	☐		
New front desk instructions are entered by residents	☐		
Access requests by residents	☐		
When an amenity reservation is made or commented on	☐		
Pending Content by residents	☑		
Resident Satisfaction Survey submission by residents	☐		

Save Changes

3. To edit your privacy settings, select *'Privacy Settings'.*

🔒 **Privacy Settings**

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Navigating Payments, Service Requests and Online Renewals

Residents can make payments and submit service requests from their desktop or their mobile device!

1. Staff will manage RealPage payments, service requests and online renewals from OneSite.

Payment Center

Please visit OneSite to manage payments for your community.

2. Registered residents will be able to utilize RealPage payments, service requests and online renewals from their portal under their *Quick Links* or the *My Dashboard* drop down menu. To be added in ActiveBuilding, current residents must have an email, be marked as an occupant, cannot be a cosigner or guarantor and their age must be greater or equal to 18 or left blank in OneSite to be added in ActiveBuilding.
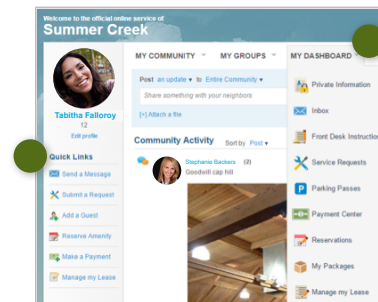
3. Former residents can make a payment for up to 90 days after move out by logging in with their email and password at <propertyname>.activebuilding.com. However, in OneSite if the box is unchecked in the *'Resident profile'* tab for *'this resident has access to the secure resident portal and following features'* they will not be able to make payments as a former resident.

4. Approved applicants that have been assigned a unit number can make a payment through the *'New user? Get started now?'* workflow on the right side of the login page listed previously.

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Troubleshooting

If a resident receives an error, what should you do? Please check for the following settings in OneSite.

1. Residents must have an email listed in OneSite.

2. It could be because the resident is disabled in OneSite under their resident profile tab. The online rent payment and service request boxes need to be checked.

3. In order for residents to make a payment, submit a service request, or online renewal they must have a resmID listed in ActiveBuilding. To find the resmID for the resident you will need to look in OneSite for a report named **Contact Level Details**. Next, add it in ActiveBuilding under **My Dashboard** > **Resident Management** > select **Resident whose resmID is missing** > Under **Basic Info** add **Corporate ID**.

4. For payments, residents cannot be flagged for eviction, collections or do not allow check payment under special/collection status.

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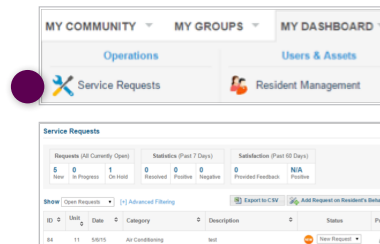
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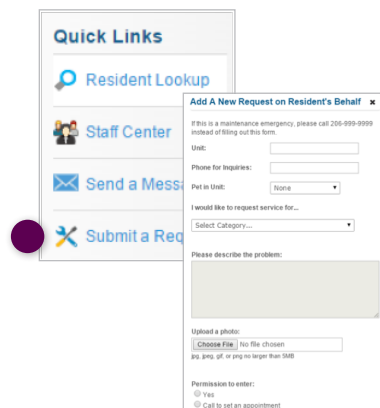# Service Requests

Users can submit requests 24/7!

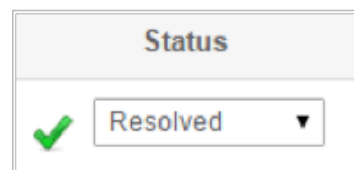**1.** You will manage in ActiveBuilding under *My Dashboard* > *Service Requests.*

2. To add a service request, go to your *Quick Links* and select *Submit a Request* or go to *My Dashboard* > *Service Requests* > *Add Request on Resident's Behalf.* Fill out the information.
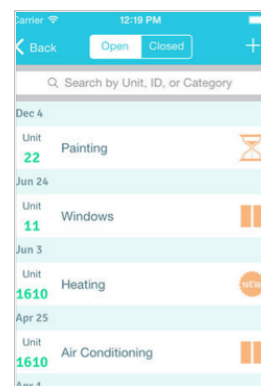

3. When a resident adds a service request, they will receive an automated response letting them know that their request was received. You will also receive a notification letting you know that a resident submitted a request. When you update the status of a request the resident will be notified.

4. There is an iOS app for staff to manage service requests called ActiveDesk. It is free to upload.

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Lobby Display Screen

The Lobby Display Screen (LDS) is a specialized web view for your ActiveBuilding portal that is designed for large TV screens in your building lobby.

*To edit your settings, select **My Dashboard** > **Lobby Display Screen** from the home page.*
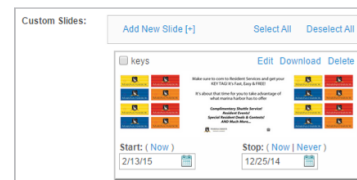
1. You can change your theme by selecting Energized, Traditional, Black Tie and Legacy.


2. A custom slide is a bigger, more visual way to display announcements to your community. To do this go to **Custom Slides** and add a new slide. You can remove custom slides at any time, or choose a start and end date for the slide.

3. If you have a resident who wishes to receive email or text notifications when you log a package for them, but does not want their unit number displayed on your lobby display screen you can do this under **LDS Package Settings** > **Privacy** > **Hidden Units on Lobby Display** Screen.
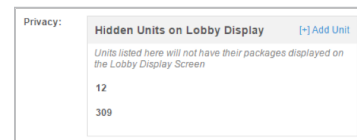
**4.** Packages, custom slides, events, announcements and local offers currently show up on the LDS website.

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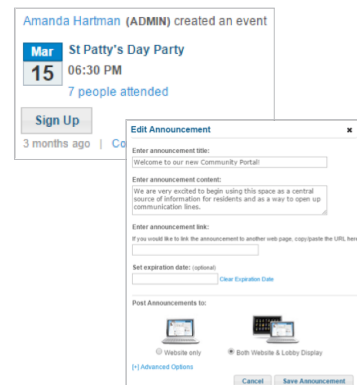
Other Operational Features

Replace paper logs and streamline services!

*To turn on features, go to **My Dashboard** > **Application Settings** > **Modules and Features** > select feature and switch **ON** > **Save Changes.***

1. Front Desk Instructions allow residents and staff to add authorized guests. To add a guest, go to **Quick Links** > **Add a Guest**. Or you can add guests using our iOS ActiveDesk app. Staff and residents will receive a notification when a guest has been added for the unit. To view active authorized guests go to **Quick Links** > **Resident Lookup.**
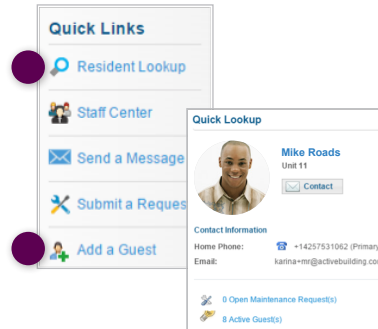
2. You can keep track of parking and storage spaces under **My Dashboard** > **Parking and Storage.**
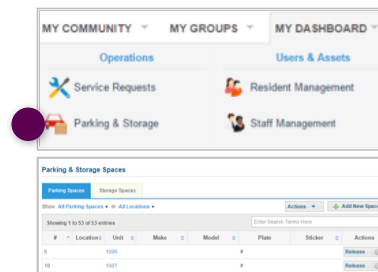
3. Residents can find Internet, TV, and electric providers in their area, they can compare local providers and prices and sign up for multiple services all in one place and all with the guaranteed best prices. MyUtilityConnections can be found under **My Community** > **General Info.**

4. There is a Resident Satisfaction Survey that is based on a net promoter score survey. It asks one simple question, *'would you recommend <property name> to a friend?'* They are used to help gauge what is going on in the community and keep resident feedback even more internal. The **Resident Satisfaction** survey will appear for staff only under **My Dashboard.**

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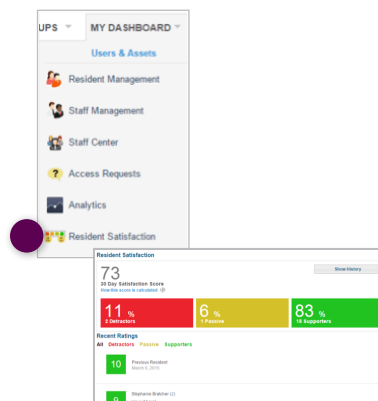
Package Tracking

ActiveBuilding's most popular feature!

1. To add a package go to *My Dashboard* > *Package Tracking* > select *Add Packages* in the upper right corner or select *Package Tracking* from your *Quick Links.* To add a package through the desktop portal you will use a scanner. There is also a staff iOS app for logging packages, ActiveDesk.
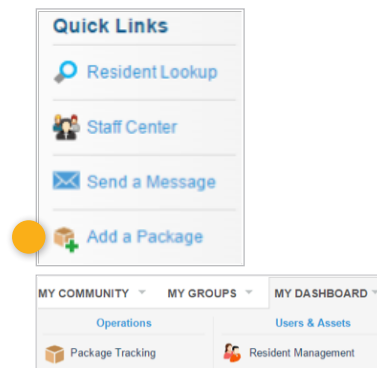
2. Select the package carrier type, unit number or residents name and the tracking number > select *Submit*. Residents will receive a new package notification in real-time (even if they are unregistered). Registered residents can choose to receive text or voice notifications in their notification settings.

3. To sign a package out, go to *My Dashboard* > *Package Tracking* > select package from the *Active Packages* tab > *Sign Out.* If a signature is required in your Application Settings, you will need to collect a signature before submitting.

4. All archived packages will appear under the archive tab. Here you can view package details and search packages (even export details).

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Amenity Reservations

Users can submit 24/7!

**1.** Staff and residents can reserve an amenity under their *Quick Links* > *Reserve Amenity* > select amenity to reserve > *Reserve This Amenity*. When a resident reserves they will receive an automated response letting them know that their request was received and that it will be reviewed.
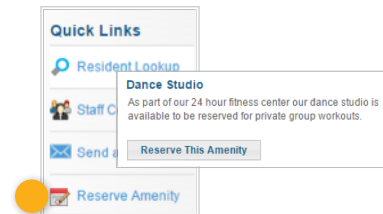

2. You will also receive a notification letting you know that a resident reserved an amenity. To approve, deny or cancel an amenity go to *My Dashboard* > *Reservations.* When a reservation status is updated the resident will be notified. Note: there are no double bookings of reservations.
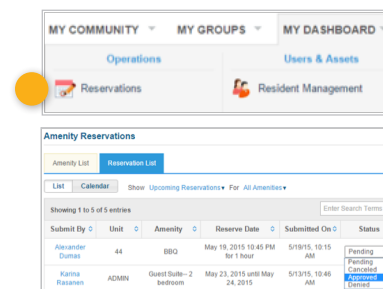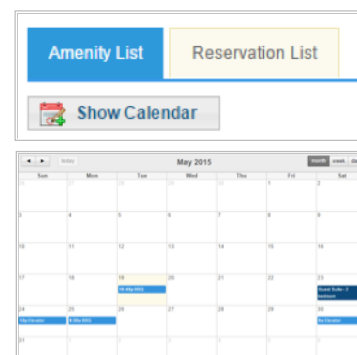

3. You can also view past reservations for up to two months in this same section by selecting the *'Past Reservations'* option from the *'Upcoming Reservations'* drop down list.
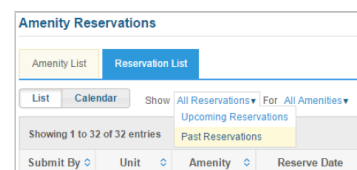
4. Additionally, there is a calendar view under *My Community* > *Amenities* > *Show Calendar* that will show details by hovering over the reservation.
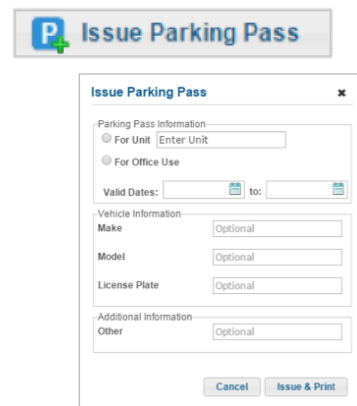
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Parking Passes, Key, Entry and Inventory Logs

Replace paper logs and streamline services!

*To turn on features, go to **My Dashboard** > **Application Settings** > **Modules and Features** > select feature and switch **ON** > **Save Changes.** All features will show under **My Dashboard.***
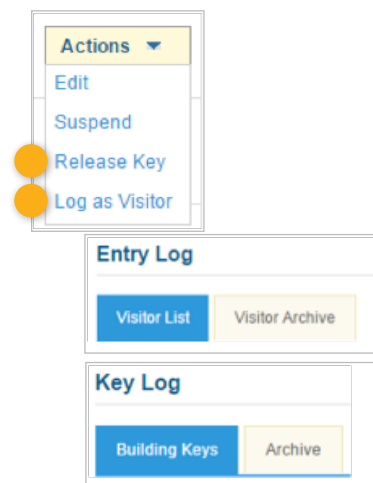
1. You can issue printable parking passes to guests and even allow residents to issue a pass themselves.
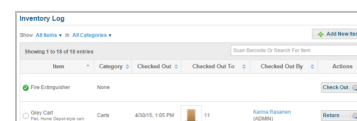

2. Front Desk Instructions allow residents and staff to add authorized guests. Clients on the concierge package can also log a visitor and release a key using this feature either from **My Dashboard** or **Resident Lookup** > **Active Guest(s)** > **Active Instructions** > **Actions** > **Release Key** or **Log as Visitor.**

3. The inventory log can be used to keep track of which residents have checked out inventory and view the history. Some items you can use this for include: movies, DVDs, carts, tools, etc.

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